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The Journal of the American Newspaper Publishers Association

GIVING PAID NEWSPAPERS A RUN FOR THEIR MONEY

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presstime

INDEX VOLUME 10, NUMBER 1 JANUARY 1988

Special Report *There has been a small but steady shift for weekly newspapers toward free circulation. Some of the earliest date back to the 1930s. Today, their numbers are estimated to be in excess of 2,000 in North America. Even paid-circulation papers have their own version of the freebie in their total- or target-market publications. And lately, free papers have become hot investment properties. But there are problem areas, and some newspaper people denigrate this segment of the business. Even so, many experts label the free-paper field a fertile growth area.* **22**

Outlook '88 *Despite economic uncertainty, publishers and newspaper analysts see a more profitable year ahead for U.S. daily newspapers.* **6**

Regional marketing *The trend among national advertisers to target their ads geographically has the potential for generating more ads for newspapers.* **10**

Campaign coverage aplenty *Newspapers are readying bigger-than-ever election efforts amid questions about the kind and quantity of coverage warranted.* **14**

British press revisited *The newspaper revolution in the United Kingdom is continuing as publishers flee Fleet Street for new quarters.* **18**

Ousting unions *Elections to decertify unions are now occurring at newspapers at the rate of about one a month. Most of them have bad outcomes for unions.* **30**

Sending out for separations *Using commercial color-separation houses is commonplace among smaller newspapers that can't afford scanners.* **35**

Profile: Karen Howze *Wanting to help people led the managing editor of USA Today's international edition first to the convent, then to journalism.* **36**

Essay: Accrediting lesson *Journalism educator George P. Kennedy says Allied Daily Newspapers' venture into evaluating J-schools fills accreditation gaps.* **38**

Shuffling the media mix *K mart reduces its preprint program, cancels a four-state Advo contract and plans more broadcast spending.* **50**

Electronic darkrooms *Three newspapers experiment with the wire services' digital photo systems. Testing will expand early this year.* **56**

ANPA nominees *Association's Board approves slate of ANPA officers, directors. The New York Times' Arthur Ochs Sulzberger will be nominated chairman.* **66**

Economic Outlook '88, p. 6

Free Newspapers, p. 22
(Cover photo by John Bowden.)

Color Separations, p. 35

Advertising	50	Government affairs	40	Research	48
ANPA calendar	65	Letters	67	Speeches	55
ANPA news	66	News-editorial	46	State and local	42
Chairman's corner	4	Newspaper business	63	Technology	56
Circulation	64	Newsprint	61	Telecommunications	49
Education	48	Overset	68	Transportation	64
Employee relations	52	Postal affairs	44	World press	41

CHAIRMAN'S CORNER

Postal Rate Commission, meet an average newspaper

Everyone interested in postal rates has been expressing views to the Postal Rate Commission in recent months. Some parties have been saying a lot of misleading things about newspapers.

So, a few weeks ago I submitted testimony telling the commissioners how newspapers really work, using as an example the operations of my Concord (N.H.) Monitor, which at 22,000 circulation is just about the exact size of the average ANPA-member newspaper. (See story, p. 44.)

I told the commissioners we newspaper people appreciate their delicate task as they seek to balance all the rate-setting criteria in the law and all the mailer interests in the marketplace. Commissioners need to be aware that direct mailers want to use the rate hearings to tilt the marketplace in their own favor. They also must take into account the benefits to our democracy when newspaper advertising contributes to the flow of news to the public.

George W. Wilson

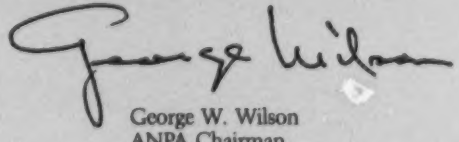
The commissioners understand what the Postal Service calls "institutional" costs. Basically, that's overhead the service doesn't attribute to any single class of mail. Newspapers, as users of the mail and competitors of others who use the mail, depend on the commissioners' insistence that *all* classes of mail pay their own attributed costs and make a full contribution to the overhead.

I have asked the commissioners to understand that newspapers have "institutional" costs, too. From every advertising message a newspaper must derive a contribution to its editorial expenses. I provided them some examples of the Monitor's costs of covering the New Hampshire Primary, preparations for the Challenger flight and the Seabrook reactor story.

The Postal Service supports a system of universal delivery service and thereby knits this nation together; that is its institutional role in our society. Newspapers, the great mass medium of news information, help this nation form consensus opinions on matters of public policy by reporting the news in depth; that is our institutional role in America.

I reminded the commissioners that they added an extra foot or two to our hurdle for successfully doing business when, starting in about 1979, they purposefully lowered third-class rates to let the Postal Service draw advertising out of newspapers and into the direct-mail business. My statement explained the consequences of that for the Monitor and for all newspapers.

I told the commissioners I wasn't asking for special protection for newspaper advertising, but I wanted them to understand our own institutional costs, just as they understand their own, before they compare us too closely to direct mailers. I urged them to see our business properly and whole and to set fair rates under which every class of mail pays its share.



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BRITISH NEWSPAPERS

As streamlined operations relocate to the bank of the Thames,

BY BRIAN P. KNOX-PEEBLES

(Editor's note: In the December 1986 issue of **presstime**, *Knox-Peebles chronicled the first phase of the revolution going on in British newspapering: the transformation of an industry from one dominated by outdated technologies and labor practices to one that is market-led, state-of-the-art produced and responsibly managed. This article updates the original and charts the continuing tumult in the British press.)*

Massive changes taking place in the British newspaper industry are advancing along lines broadly laid out a year ago.

Three sets of events concluded the initial 16-month-long phase last February.

One was the sensational backing down on Feb. 5 by the largest print union, SOGAT (Society of Graphical and Allied Trades) in the face of legal action. SOGAT, threatened with final sequestration of its assets, agreed to abandon a brutal and violent strike that had lasted for 13 months. The union tried to force Rupert Murdoch of News International either out of business or to restore 5,500 jobs and positions of influence union members held prior to his move from Fleet Street to Wapping.

Knox-Peebles is group marketing director of one of the principal operating divisions of London-based United Newspapers, a major newspaper and magazine publishing company with interests also in the United States.

The second big event came just days later when the National Graphical Association, the other major union involved at Wapping, similarly backed down.

The third was the announcement by Express Newspapers of plans to sell its Fleet Street building and move to a new administration and editorial center near Blackfriars Bridge. It was the last of the Fleet Street companies to make clear its intentions to relocate.

Express Newspapers' London printing operation will move to the Docklands area, where the existing Daily Telegraph plant will be expanded, and the new operation on the bank of the Thames will be owned jointly by United Newspapers and the Telegraph. The balance of the production of Express papers will be carried out in northern England.

Express Newspapers, which had already laid off 2,100 employees, or 31 percent of its workforce of 6,800, in March 1986, announced it will lay off another 2,500 because of job redundancies. Total cost of redundancies in 1986 and 1987 will be well over 100 million pounds (about $183 million U.S.), but the sum should be recovered over 18 months.

The Illustrated London News

No longer is Fleet Street the hub of British newspapering.

ASSESSING PHASE I. Most of the new national newspapers, whose launches have been made possible by the huge reduction in "cost of entry," belong to what I have characterized as Phase II of the British press evolution—February 1987 to the present. However, in assessing the successes and failures among them, it is convenient to include the first two to emerge—News U.K.'s Today (March 1986) and The Independent (October 1986).

These are difficult judgments, not so much in assessing whether a paper is going to make it as in deciding whether circumstances may be artificial, transient and irrelevant.

This situation is compounded by aspirations of the protagonists who may not immediately have seen that what they so lovingly and so lavishly gave birth to was, both technologically and in concept, a 25-year-old.

Some who possessed energy levels of quite extraordinary dimensions, as well as financial acumen and resources of similar proportions, have not only survived the catharsis but returned for the next round. Others have succumbed entirely or withdrawn temporarily to lick their wounds and contemplate the next step.

Of the survivors, **Robert Maxwell**, chairman of Maxwell Communication Corp., plainly has the stamina to come through. His London Daily News was launched last February as a direct competitor to London's Evening Standard. For a number of reasons—inadequate planning, poor distribution, flawed production—the Daily News

POST-FLEET STREET

publishers look forward to going to a different kind of bank

closed in only five months, much to the consternation of everyone involved.

Its circulation had fallen to less than 100,000, far from projected sales of over 500,000 needed to challenge the Standard. Financial losses were in the neighborhood of 1 million pounds ($1.83 million U.S.) per week.

Maxwell's apparent belief, in a commercial context, in permanent revolution is appropriate at a time of continuous upheaval as one set of practices and ideas after another is rushed in, tried and, very often, rejected. Following the collapse of the Daily News, for instance, Maxwell announced he intends to start another London evening paper and to introduce in London this year a four- or five-day free daily called The Londoner for distribution to 1-2 million households.

Maxwell also plans a free daily in Manchester; a middle-market tabloid called News Day for national distribution; a Paris-based, English-language European daily; a daily newspaper simultaneously in London and Tokyo; the possible launch of the Netherlands' first Sunday paper; and the possibility of an English-language edition of Pravda.

He already publishes the European edition of the China Daily.

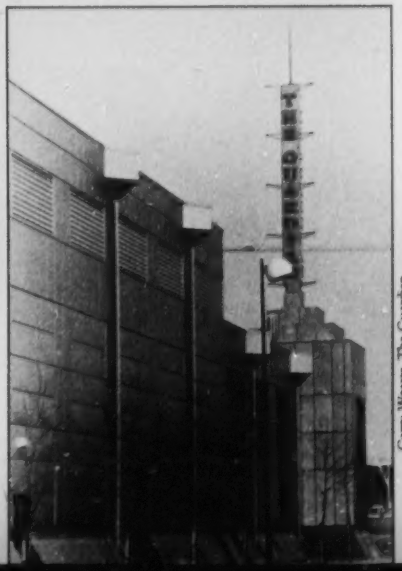
All this will be attempted alongside his U.S. ventures in commercial printing and in transmitting newspaper advertising by satellite. He also made an unsuccessful effort to enter the U.S. book market by attempting to buy Harcourt Brace Jovanovich.

Eddie Shah is a more uncertain quantity. He was father of the revolution in 1985 with his state-of-the-art color tabloid Today, for which he aspired to a circulation of 1.5 million and profits of 20 million pounds on sales of 50 million pounds (profit of $36.6 million U.S. on sales of $91.5 million). He was unlucky, however, with both his technology and with those who installed it. He also classically underestimated the level of entrenched competition he would face and, finally, the cost of correcting mistakes.

Today collapsed bankrupt into the arms of the Lonrho Corp., owner of The Observer, five months after start-up. Its circulation stood at around 300,000 and losses at some 12 million pounds ($22 million U.S.) per month. It subsequently was sold to Rupert Murdoch who, for tactical reasons related to his plans to print his main newspapers in color, wanted access to its color plant.

Daily Telegraph

The Observer



Carry Weaver, The Guardian

Activity is shifting to Southwest London for The Observer (above) and to the Docklands area of East London for (proceeding clockwise) the Daily Telegraph, The Financial Times and The Guardian.

Here is a synopsis of the other major newspapers involved in Phase I.

• **The Independent.** The most skillful action taken by what looks to be a long-term survivor was the decision to present this new paper as though it had always been there, hence silencing the guns of those suffering from the well-known British disease of being unable to tolerate success. Effectively, what Editor Andreas Whittam-Smith and his team said was that they were embodying an aspiration of the intelligentsia for a politically uncommitted newspaper to fill the gap many felt had been created by Murdoch's acquisition of The Times of London.

The Independent began in October 1986 and was an instant editorial success. Acclaimed "Newspaper of the Year" soon after the launch, it has won a solid readership. With circulation rising steadily and topping 380,000 in November 1987, it is reckoned to be on course to break even financially early this year.

• The **News on Sunday**, started last April, followed in Today's footsteps with an unsuccessful, much criticized launch and circulation well below its break-even target. Problems beset the paper even before launch. Run by a consortium with all decisions, including editorial, in the hands of a committee, the

The Financial Times

News on Sunday was soon abandoned by its founders.

Neither editing by committee nor the paper's commitment to substantial minority representation on its editorial staff provided the market supposedly eager for a very left-of-center paper with what it wanted to read. The first edition was rightly judged a flop.

The News on Sunday subsequently was taken over by outside business interests. By September, the ailing newspaper was on its fourth editor, and circulation was about half the 300,000 copies needed to make it viable. Only substantial improvement in the product and a hard-hitting advertising campaign—leading to a doubling of circulation and significant advertising gains—could have saved the paper. Those did not come, and the paper on Nov. 20 left the market as unobtrusively as it had entered it.

• The **Evening News** was launched by Associated Newspapers as a "spoiler" on Feb. 24, 1987—the same day Maxwell introduced the London Daily News. The Evening News initially lost an estimated 50,000-60,000 pounds ($91,000 to $110,000 U.S.) a week. It appointed Fleet Street's first woman editor, Lori Miles, and by May was claiming a circulation of 50,000.

In September the newspaper underwent a relaunch in an attempt to attract more of its target audience, young working women.

The most skillful action was the decision to present The Independent as though it had always been there.

The circulation goal was 100,000, but even this was not reckoned sufficient to guarantee profitability.

On Oct. 30, the paper was closed. Circulation stood at 39,000.

• The **Sunday Sport** was launched regionally Sept. 14, 1986, in London and later in the Midlands, Northern England, Wales and Northern Ireland. Its circulation reached nearly half a million in eight months. Sunday Sport relies on a content mixture of sexually oriented material and articles on sports written by famous names.

The Sunday paper's initial success led to ambitions to start a daily version. This was seen as a possible major threat to another tabloid operating broadly in the same sector of the market, The Star, owned by Express Newspapers. Managements of both papers concluded that joint daily operations were preferable to a head-on clash, as Express Newspapers had plans for a Sunday Star. The competitive launches were abandoned, and a partnership was forged with an intitial transfer of editors.

That relationship failed, however. Seven weeks after entering into the partnership, Express Newspapers severed the link. Plans for a Daily Sport may now be reactivated.

• The **Daily News** of Birmingham, the United Kingdom's only free daily, has yet to make a profit. However, the 3-year-old Tuesday-to-Friday paper has made a remarkable impact on its market, and publishers are watching its progress with continued interest. It has been named "Britain's top free newspaper" among more than 950 such publications "for an outstanding contribution to newspaper design."

In an interesting development on Nov. 5, it was announced that U.S. publisher Ralph Ingersoll II acquired the established, paid competitors of the Daily News—the Birmingham Post and Mail, and allied publications. Purchase price was reportedly more than 60 million pounds ($107 million U.S.) In commenting on the purchase, The Financial Times alluded to the fierce battle between the publications, but it is unknown whether the sellout had anything to do with that situation.

National Newspapers in Great Britain[1]

	Circulation (000s)	Launched 1986	1987 Launches	Proposed 1988 Launches
Quality Dailies (and Owners):		Independent (Newspaper Publishing plc)	London Daily News, launched Feb. /closed July	Londoner, free daily (Robert Maxwell)
Times (News International plc)	447			National mid-market daily (Robert Maxwell)
Guardian (Guardian and MEN plc)	473			
Daily Telegraph (Daily Telegraph plc)	1,171			
Financial Times (Financial Times Ltd.) (Pearson plc)	222			
Popular Dailies:		Today (News U.K. Ltd.)	Evening News relaunched Feb./closed Oct. (Associated Newspapers)	
Daily Express (United Newspapers plc)	1,675			
Daily Mail (Assoc. Newspapers)	1,794			
Sun (News International plc)	4,021			
Star (United Newspapers plc)	1,240			
Daily Mirror (Mirror Group Newspapers Ltd.)	3,097			
Quality Sundays:				
Sunday Times (News International plc)	1,234			
Observer (The Observer Ltd.)	773			
Sunday Telegraph (Daily Telegraph plc)	733			
Popular Sundays:		Sunday Today (News U.K.), closed June '87	News on Sunday (News on Sunday Publishing plc)	
Sunday Express (United Newspapers plc)	2,222	Sunday Sport (Apollo Ltd.)		
Mail on Sunday (Assoc. Newspapers)	1,772			
News of the World (News International plc)	5,021			
Sunday Mirror (Mirror Group Newspapers)	2,959			
Sunday People (Mirror Group Newspapers	2,869			

[1]As of September 1987

Ingersoll is believed to be the first non-British or Commonwealth national to have bought into the U.K. newspaper industry.

PHASE II. The first of three major parts in the current phase of Britain's newspaper revolution is made up of the wave of new publications that followed the launch of Shah's Today and The Independent, and Murdoch's 1986 move from Fleet Street.

The second part of Phase II consists of the moves out of Fleet Street. It includes the sale of the old premises; the shedding of substantial elements of the workforce and the demise of power of the traditional labor unions; the re-equipping with state-of-the-art technology and new presses having enhanced color capacity; and finally, the decision by one-third of the industry to opt for contract printing largely in the provinces.

The Fleet Street departures and job eliminations actual and expected are as follows:

- January 1986: News International, 5,500 jobs
- March 1986-February 1989: Express Newspapers, 4,600 jobs in two stages.
- Early 1986: Mirror Group Newspapers, 2,100 jobs initially and possibly 2,500 later
- Summer 1987: Daily Telegraph, 1,000 jobs
- December 1987: The Observer, 500 part-time jobs
- January 1988: The Guardian, undetermined number of jobs likely to go
- Late Summer 1988: The Financial Times, 400 jobs
- Late 1988: Associated Newspapers, 700 jobs and possibly more later

All of these companies will go to "greenfield" sites on the Thames.

Once these moves are completed, two-thirds of the U.K. newspaper industry will be produced at in-house plants. They are the News International and Mirror Group titles, Associated Newspapers, the Daily Telegraph, The Guardian and The Financial Times.

The rest will be contract-printed either totally or in part. They are Express Newspapers (part), The Independent, The Observer, The Guardian (part) and Sunday Sport.

It is interesting to wonder which of those that chose to set up plants ahead of the Today initiative and Murdoch's move to Wapping would have done so had they known how that move would turn out.

There are indications that at least two might have had second thoughts about building their own plant. Part of the reason is the taste of freedom they have enjoyed for the past year while being contract-printed, in a construction interim, on presses in the provinces. Part lies in the genuine anxiety that the practices that so bedeviled management/union relations on Fleet Street may be surreptitiously transported to Docklands.

By the end of this year, all British national newspapers are expected to be profitable for the first time in memory.

Whether they are right to be anxious is open to question. When the International Typographical Union in the United States experienced the same process as is now engulfing the major unions in the United Kingdom, its membership declined about 80 percent.

If those figures are matched in Britain, it is difficult to see how the unions could assemble sufficient influence to be a real force again. There are moves to create a single print union and also to sever links with the Labor Party, but a continuing decline in membership seems to be the most realistic prospect.

Certainly the trade-union movement in general in Britain is going through a period of massive adjustment as it contemplates the scale of Prime Minister Margaret Thatcher's third-term election victory and the enormous influence that her "stock- and property-owning democracy" is having on the Labor Party, traditional champion of the unions.

The third section of Phase II is an elaborate form of shadow-boxing, as the principal protagonists attempt to ensure that their rivals do not gain too much ground. Many, if not most, of the big companies are also faced with the difficult problem of motivating personnel who may not stay beyond the date of the moves. Many such workers are tied in for the duration by severance packages that are dependent upon responsible behavior till the end.

However, some aspects of this period of phony war provide, in a way, light relief to tensions behind the massive financial and human decisions that are being made during this extraordinary period in the history of the newspaper industry in the United Kingdom.

It consists of extensive disinformation put out about launches, the likelihood of whose eventual happening is minimal; experimentation with alternative production and distribution arrangements; testing of a wide variety of product innovation; flirtation with color; massive promotion expenditures; and predatory moves by media magnates against others of their kind.

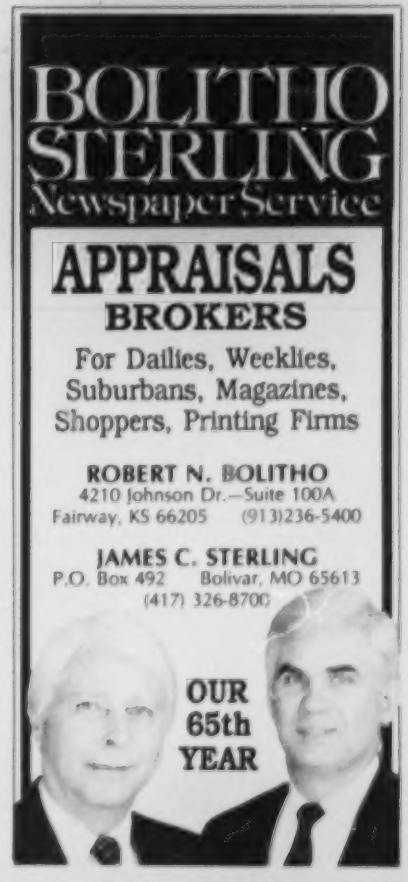
LONG-TERM OUTLOOK. Until now, no more than four national newspapers in Great Britain made a profit in any given year. By the end of this year, however, all are expected to be operating profitably for the first time in memory.

An estimated 1 billion pounds ($1.83 billion U.S.) will have been poured into new plants and into implementing workforce reductions. More than 15,400 jobs in a workforce of 30,000 will have been eliminated.

Financial analysts estimate that this year, revenues of national newspapers will stand at 1.65 billion pounds ($3 billion U.S.) and pre-tax profits at 205 million pounds ($375 million U.S.) against 1.4 billion pounds and 50 million pounds, respectively, in 1985.

The market has demonstrated great strength and stability because of an apparently insatiable appetite for information. It will be well-placed to face the future, even if it might do well to ask this basic question: "Is there a market for my product and, if so, what are its characteristics?"

The palaces that have been raised have, after all, but one purpose—to provide products that people will want and need, not only today but into the 21st century. □



October consumption breaks all records

October 1987 was a record month for newspaper consumption by all U.S. users and by U.S. daily newspapers.

According to preliminary figures, all users consumed 1,124,143 metric tons. That figure is 3.3-percent above the previous record of 1,088,183 tons set in October 1986.

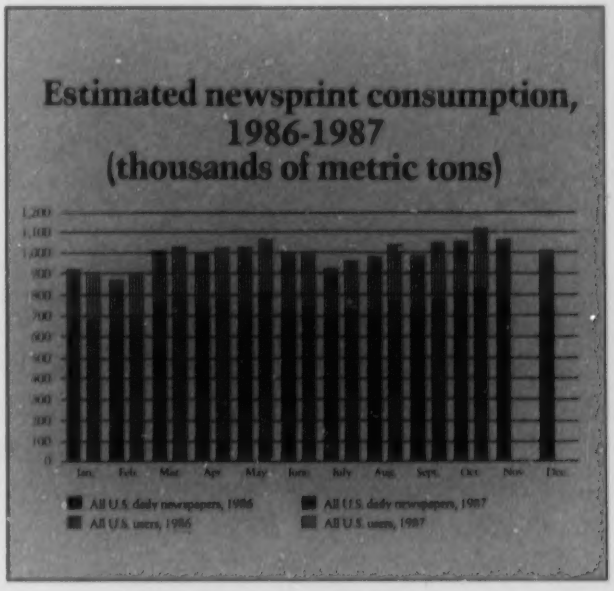
Consumption by U.S. dailies was 830,248 tons, 3.5 percent (about 28,000 tons) more than the previous record also established in October 1986.

For the first 10 months of 1987, consumption was up 2.9 percent for all users and 4.9 percent for U.S. dailies.

Newsprint inventories of newspapers in ANPA's statistical sample averaged 39 days' supply at the end of October, down one day from the year-earlier level. Mill stocks were up 1.8 percent.

The Canadian mills' operating rate averaged 97 percent for October as well as for the 10 months. U.S. mills operated at 95.6 percent of capacity in October and at 94.5 percent for the 10 months.

Canadian production in October increased 2.3 percent from October 1986, while U.S. production rose 8.3 percent.



Estimated consumption of all U.S. daily newspapers[1]

Region	September 1987(r)	September 1986	% Change
Northeast	197,142	191,337	+ 3.0
North Central	166,708	157,788	+ 5.7
South	237,313	222,909	+ 6.5
West	175,894	162,567	+ 8.2
Circulation Size			
up to 25,000	61,141	55,524	+ 10.1
25,001-100,000	161,504	146,340	+ 10.4
Over 100,000	554,412	532,737	+ 4.1
September totals	777,057	734,601	+ 5.8
Nine-month totals	6,821,817	6,491,444	+ 5.1
Region	**October 1987(p)**	**October 1986**	**% Change**
Northeast	214,127	208,033	+ 2.9
North Central	176,558	169,559	+ 4.1
South	254,418	247,495	+ 2.8
West	185,145	176,727	+ 4.8
Circulation Size			
up to 25,000	65,902	59,314	+ 11.1
25,001-100,000	170,748	159,899	+ 6.8
Over 100,000	593,598	582,601	+ 1.9
October totals	830,248	801,814	+ 3.5
Ten-month totals	7,652,065	7,293,258	+ 4.9

Estimated consumption of all U.S. users

	1987	1986	% Change
August totals	1,040,896(r)	997,342	+ 4.4(r)
September totals	1,051,893(r)	998,655	+ 5.3(r)
October totals	1,124,143(p)	1,088,183	+ 3.3(p)
Ten-month totals	10,135,230(p)	9,848,629	+ 2.9(p)

Production

	Canada	U.S.A.	North America
October 1987	826,574	460,906	1,287,480
October 1986	808,371	425,740	1,234,111
Increase	+ 18,203	+ 35,166	+ 53,369
	+ 2.3%	+ 8.3%	+ 4.3%
Ten months 1987	8,077,413	4,409,254	12,486,667
Ten months 1986	7,724,173	4,251,024	11,975,197
Increase	+ 353,240	+ 158,230	+ 511,470
	+ 4.6%	+ 3.7%	+ 4.3%

Shipments

From Canadian mills	U.S.A.	Canada	Export	Total
October 1987	592,707	105,517	112,800	811,024
October 1986	594,391	102,320	119,045	815,756
Ten months 1987	5,866,089	963,236	1,238,947	8,068,272
Ten months 1986	5,612,248	914,927	1,217,187	7,744,362
Increase	+ 253,841	+ 48,309	+ 21,760	+ 323,910
	+ 4.5%	+ 5.3%	+ 1.8%	+ 4.2%
From U.S. mills				
October 1987	435,959		19,591	455,550
October 1986	403,531		32,886	436,417
Ten months 1987	4,171,305		239,191	4,410,496
Ten months 1986	3,971,369		278,197	4,249,566
Increase or decrease	+ 199,936		-39,006	+ 160,930
	+ 5.0%		-14.0%	+ 3.8%
From North American mills				
October 1987	1,028,666	105,517	132,391	1,266,574
October 1986	997,922	102,320	151,931	1,252,173
Ten months 1987	10,037,394	963,236	1,478,138	12,478,768
Ten months 1986	9,583,617	914,927	1,495,384	11,993,928
Increase or decrease	+ 453,777	+ 48,309	-17,246	+ 484,840
	+ 4.7%	+ 5.3%	-1.2%	+ 4.0%

Stocks

U.S. publishers[2]	Tonnage	Days' supply On hand	Days' supply In transit
August 1987	904,565	37	6
August 1986	892,786	38	6
September 1987	929,084	37(r)	6
September 1986	904,331	36	6
October 1987	900,642(p)	33(p)	6(p)
October 1986	887,474	34	6
Canadian mills			
October 1987	261,345	—	—
October 1986	270,208	—	—
U.S. mills			
October 1987	47,932	—	—
October 1986	57,953	—	—

[1]Based on stratified data from newspapers in ANPA statistical sample, figures in this and other tables are in metric tons.

[2]Represents stocks of newspapers in ANPA statistical sample.
(r) = revised (p) = preliminary